

## **Partnership for Philanthropic Planning Member Council and Partnership Board of Directors Speaking Engagement Guidelines**

Current members of the Partnership for Philanthropic Planning's Board of Directors are available to make educational presentations to member councils. This service is provided as a benefit of Partnership council membership, to help further the educational purpose of planned giving councils and promote understanding between councils, their members and the Partnership. In considering speaking engagements, board members and councils should be aware of the following guidelines:

- ❑ Acceptance of speaking invitations is at each board member's individual discretion.
- ❑ Board members must consider their employment and personal commitments when choosing availability to accept a council's invitation. Non-acceptance of a speaking invitation is not meant to imply a lack of interest or council support on the part of the board member or the Partnership. The Partnership will make every attempt to provide assistance if a council is experiencing difficulty securing a board member to speak.
- ❑ Board members are expected to speak, at least briefly, about the benefits of Partnership membership and participation as a part of their presentation.
- ❑ The council will reimburse all related travel expenses. Expenses to be reimbursed include, but are not limited to:
  - Coach class airfare. Board members have the right to book a preferred airline or itinerary, but any cost considerations should be clearly agreed upon and communicated by the council prior to booking transportation.
  - Hotel room charge and tax
  - Meals
  - Incidental travel expenses including, but not limited to taxis and tips

It is recommended that council expectations about reimbursable expenses be discussed with the board member and agreed upon in advance.

This applies to routine council meeting presentations, conference keynote or breakout presentations and similar engagements. **This does not apply to multiple presentations or half-day or all-day workshops, payment for which are at the discretion of the individual board member.**

A Speaker Agreement should be executed (see enclosed).

**Partnership for Philanthropic Planning**  
**Board of Directors Speaking Agreement**

Name of Council \_\_\_\_\_

Name of Board Member \_\_\_\_\_

Date of Presentation \_\_\_\_\_ Time of Presentation \_\_\_\_\_

Location \_\_\_\_\_

\_\_\_\_\_

Topic(s) \_\_\_\_\_

\_\_\_\_\_

Expenses to Be Reimbursed \_\_\_\_\_

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Additional Notes \_\_\_\_\_

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Council Contact Information

Name \_\_\_\_\_

E-Mail \_\_\_\_\_

Telephone \_\_\_\_\_

Fax \_\_\_\_\_

Board Member Contact Information

Name \_\_\_\_\_

E-Mail \_\_\_\_\_

Telephone \_\_\_\_\_

Fax \_\_\_\_\_

\_\_\_\_\_ Copy to Council

\_\_\_\_\_ Copy to Board Member

\_\_\_\_\_ Copy to the Partnership [Fax 317-269-6276]